

April 13, 2017

To: Town of Loomis Library Board

From: Friends of the Loomis Library

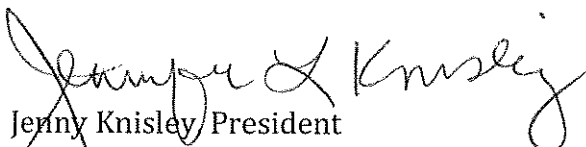
Re: Loomis Library and Community Learning Center Operations Proposal

Per the Town of Loomis Library Board's request at their April 10, 2017 meeting, this correspondence is to act as formal notification of the Friends of the Loomis Library's ("Friends") intent to enter into an agreement with the Town of Loomis to operate the Loomis Library and Community Learning Center ("Library") for the period of one year, to be renewable on a yearly basis.

Please accept the business plan which was submitted at the March 27, 2017 Library Board meeting as our proposal for the operation of the Library for your consideration. The business plan identifies our vision, operating budget, and scope of services we intend to provide for the Library to be under the direction of a library director. The Friends intends to employ a library director and one assistant library staff member to be responsible for the administration of the library operational budget, programs, services and daily operations. Selection of the library director will be based on the recommendation of a joint Friends and Library Board hiring committee.

We look forward to working collaboratively with the Library Board to successfully establish a municipal Library as a valuable resource to the Loomis community.

Sincerely,



Jenny Knisley President  
Friends of the Loomis Library

# **A Business Plan for**

## **The Loomis Library Community Learning Center**

### **Introduction**

When the County announced closure of the Loomis Branch library in Feb. 2014, overwhelming public support led to efforts to keep the branch open, first proposing to continue as a County branch and ultimately to become a Town of Loomis municipal library, incorporating both modern and traditional library services with aspects of community center activities as well. A sales tax measure was passed in November 2016 with an advisory measure that proceeds be used predominantly for the library, now called The Loomis Library and Community Learning Center. The library is operated under a Memorandum of Understanding between the Town of Loomis and the nonprofit Friends of the Loomis Library. As a municipal library, this library will conform to California Education Code laws, including appointment of a Library Board with oversight as provided by State law.

### **TODAY'S LIBRARIES**

The **mission** of the Loomis Library and Community Learning Center is to provide a community gathering place for lifelong learning as well as cultural, social, and recreational opportunities.

Libraries today are far more than print materials such as books, periodicals and newspapers. Materials that circulate also include CDs, DVDs, eBooks and e-periodicals. Libraries are computer centers offering Internet access, WiFi, and help in using those technologies. Literacy work is important, but so are programs and activities for all ages. Today's libraries are more often seen as community hubs and learning centers, for lifelong learning and enjoyment, for socializing as well as for education. Today's libraries are community learning and activity centers, geared to the needs of the communities they serve.

The **vision** of the Loomis Library and Community Learning Center can be expressed by defining a set of goals and objectives that, as they are achieved, will make our community a better place to live:

1. The Loomis Library will support the educational goals of both students and non-students by providing resources that correspond to their diverse needs.
2. The Loomis Library will encourage children, including pre-schoolers, to develop a love of reading, learning, and libraries by providing materials and programs for children and parents.
3. The Loomis Library will provide materials of high interest in a variety of formats -- e.g., books, magazines, electronic data, videos and recordings -- for people of all ages.
4. The Loomis Library will provide citizens with information about their community, acting as a clearing-house for current information on community organizations, issues and services.
5. The Loomis Library will provide a variety of programs for the community to inform, teach skills, develop literacy, and enrich.
6. The Loomis Library will continue to develop as a community gathering place.
7. The size and ambience of the Loomis Library will complement the small town atmosphere of the Town, and offer an inviting place to be and learn.

## Market Analysis

### Who uses this library?

There were over 61,000 visits in FY 2014-15, fourth most visited library of Placer County's 11 branches.

Population: Town residents comprise 6,700 of the more than 11,000 in the County's Loomis Branch service area.

With anticipated development of 300-400 homes plus apartments in the adjacent Village at Loomis, even more people will be within a few minutes walking distance of their library community center.

**A Community Space.** The library itself is a community space, and many library-sponsored events are held in the Jesse Helms Community Room. The room also offers space for local groups to gather for a low rental fee. Bookings include groups such as Scout meetings, Scout Council adult trainings, County MAC meetings, tax help for seniors, and the weekly current events discussion group, as well as library-sponsored programs. Computer time and WiFi are in high demand. The grounds provide a pleasant place for friends to meet or use WiFi to do homework.

### Customers Expressed Needs

**Survey.** A written and online survey in Summer 2015 netted over 800 responses

- Nearly 50% visit the Library at least once a month.
- Clear satisfaction and support for traditional services.
- 85% cited providing printed and digital collections as most important.
- 65% also cited the importance of providing computers, printers, Internet, WiFi. Further inquiry has found these uses include not only research, surfing the net, searching the library catalog, but also such necessities as job search and printing resumes, internet access for those with no computer or no internet, and students who may have a high school Chromebook but no internet access at home.
- 83% cited the library as a place to research or study,
- Over 90% supported literacy work at the library.
- Expanded library programs for educational enrichment activities were also desired, such as the Summer Speaker Series. Children's Summer Reading program, STEAM activities (science, technology, engineering, arts, and math), book club and speakers for various interests.
- 60% see the library as an important gathering place, such as the Current Events discussion group, attracting 30 to 50 per week, often lunching together afterwards as well. People come every day to read the newspaper and see their friends. Both parents and area preschools bring children to weekly "Storytime," for stories, activities, songs, and games.
- Respondents also wanted the library open more hours. Hours had been reduced from 32 per week in 2014 to only 20 in 2015.

**Additional Market Research** is planned through informal gathering of input at town locations such as Raley's, the Post Office, Chamber of Commerce, and other popular businesses and locations.

**Materials offered.** The Library will continue to offer audio books, DVDs, and CDs, as well as print books, magazines, and newspapers. E-books will continue to be available online through Direct Loan programs with area libraries. We are opening with approximately 7000 print volumes and will gradually build up the collection in all media. The children's section is being reopened first, others to follow.

There is an increasing trend towards e-books, but still a large demand for print editions:

- Age demographics – we have older readers
- Some people simply prefer print books
- Studies show reading comprehension is better with print than digital

47,137 non-digital items were checked out 2013-14, fifth in the Placer County Library system.

**Marketing Strategy.** The library will have a continuing digital presence through its website, Facebook pages, and the Friends of the Library Facebook and newsletter. The Loomis News has been very helpful in publicizing library news as well. Under the new director it is expected that brochures can be printed for distribution in key locations such as Raley's, the Chamber of Commerce, and Town Hall. The proposed budget allocates \$1000 for advertizing and promotion. The library should also have a link from the Town website and be added to the businesses directional sign entering town on Horseshoe Bar road, as well as directional street signs with the standard library logo at strategic locations. For continuity with the previous County listings, the same post office box will be used.

### **Benefits of the Loomis Library Community Learning Center**

- Meets stated needs of the community
- Freedom to develop a variety of programs and events to benefit the community
- Increased use of the community room under revised policies
- More volunteer opportunities than allowed by County policy and restrictions
- Acts as a community center hub for current population, but also to future Village residents
- Makes the Village a more desirable place to live
- Brings additional traffic to current and future commercial development
- Creates a community center space without the Town having to fund and oversee it
- Continues the long-standing heritage of a library in Loomis
- Advances the Mission and Strategic Goals of the Town, March 12, 2016

### **Organization and Management of a Town Library**

#### **How it will work organizationally**

##### **General Organization**

The Town is owner of the 10 year building lease and is in the process of establishing a municipal library board in accord with State law. Per law, the mayor will be appointing, with Council consent, a Library Board to oversee the library and the Town tax expenditures for the library.

The library will be managed by a Director employed by the nonprofit Friends of the Loomis Library through a Memorandum of Understanding with the Town of Loomis. (The Town will not be the employer.) An MOU is currently in effect for management of the library by the Friends.

The Friends are paying library expenses from a "Library Operations" account separate from the Friends regular account. The Friends will hire a bookkeeper for library finances, including payroll related expenses. Some expenses, such as utilities and maintenance, are currently being paid by the Town, to be repaid over time when the tax money becomes available. Much of the start-up costs for equipment, software, collection processing, etc. has been donated to the operational account by the Friends from their savings account. Start-up computers were donated by a local business.

**Policies and procedures.** Initial procedures and policies are primarily based on adapting County policies, such as on community room rental, card application form, computer use, and check-out.

**Insurance.** Currently the Town covers the building/property insurance while the Friends cover all contents, liability, employee and volunteer related insurance.

## **Library Director**

### **Duties**

- Manages the library
- Develops and recommends plan of services to the library board
- Assists patrons
- Acquires and processes new books and media
- Tracks maintenance needs
- Books rentals and receives funds for the community room use
- Interfaces with Friends of the Library, especially on programs, fundraising, and volunteers
- Supervises volunteers working in the library (check-out, shelving, book preparation, etc.).
- Reports to the Library Board of Trustees and the Friends of the Loomis Library
- Continuing Education such as attending annual California Library Association conference

### **Qualifications**

- Preferred experience: 3 years progressive library experience as a branch manager
- College degree, library certificate preferred

No health or retirement benefits proposed

A detailed job description will be developed for the job search for a Director and Assistant

## **Friends of the Library (non-profit organization)**

- Employ the library staff
- Handle library payroll and expenses
- Fundraising
- Primary responsibility for programs in coordination with Director
- Recruit volunteers for programs and library help
- Works with Director in meeting needs of the library
- Continues to fund special needs such as collection assistance, specific programs, etc.

## **Library Board of Trustees**

A five-member board, required by the California Education Code (Sec. 18910), will be appointed by the Mayor and approved by the Town Council, and will supervise administration of the library on behalf of the Town. This provides supervision of taxpayer funds. The Library Board will select the Director to be hired by the Friends.

The Library Board serves as liaison between the Town, and the Library Director and Friends of the Library.

The Library Board, in consultation with the Director and Town Treasurer, recommends the annual library budget to the Town Council for approval.

## **Consultants**

**Library Consultant.** Friends of the Library hired Karen Bosch Cobb, an experienced library consultant, to assist the ad hoc committees and transition team in earlier processes. The Town Manager and Mayor Black have also held a conference call with her on her recommendations for moving into the municipal library phase.

**Nonprofits.** It may be advantageous to make further contact with agencies familiar with non-profit/government partnerships to assist in defining relationships between the Town, the Library Board, the Library Director and the Friends of the Library. Government agencies commonly contract with non-profits for services. Some familiar local services include Sacramento Zoo and Fairytale Town, Koinonia

Foster Homes, and Effie Yeaw Nature Center.

### **Other Professional and Advisory Support**

Attorney –Town Attorney

Accountant – J.C. Bookkeeping

Insurance – Hebard Insurance

Banking – Golden One Credit Union (Operations account), Wells Fargo (Friends regular account)

Officers of Friends of the Library

Mentors and key advisors – Cathy Crosthwaite (Sacramento Public Library), Aldo Pineschi (Roseville Library Board), Joanne Ligamari (High School Librarian), Barbara Leak (Loomis Basin Historical Society), Jenny Knisley (Chamber of Commerce), Lisa Dale and Gerald Maginity (California State Library), Gordon Medd (Loomis Union School District), Ann Baker (Loomis School Board), Dot Shiro (Loomis Basin Recreation Foundation) and others, such as the ad hoc committee members, who have researched library trends and practices as well as expressed needs in the Loomis community.

## **Budget**

### **Estimated Loomis Library Operating Budget -- See Appendix A**

#### **Regular Annual Budget (once tax measure is producing income)**

##### **Income Projections from ¼ cent sales tax**

- ¼ cent tax for 10 years. (Library funding coming from sales taxes is usually renewable.)
- Annual income estimate up to \$250,000 but budgets based on less to be conservative.
- Excess over budget for repaying any bridge funding, town moneys expended during start-up (utilities, etc.), establishing prudent reserves, and planning for expanded hours and services
- Town sales tax begins to be collected beginning April 1, 2017
- Monthly revenue to Town begins July 2017

##### **Other Revenue Streams – existing or to be developed**

- Community room rental
- In-library expanded used book sale area (“mini-bookstore”), proceeds to Friends
- Community fundraising
- Grants or special donations (usually special project, not operational ongoing expenses)
- Individual donations
- Donations from community and business partnerships
- Friends of the Library donations and underwriting of certain programs and expenses
- Possible town grants and bridge funding prior to tax revenue being received
- Possible negotiation for library property tax after withdrawal (perhaps \$60,000/year.)

##### **Use of the Funds**

- **Facility expenses**, such as maintenance, landscape, janitorial, utilities, furnishings, insurance
- **Operating Expenses**, such as staff, payroll (no benefits), staff professional development, books and materials, book processing, programs, circulation software, Direct Loan membership, computers, IT, printer expense, office supplies

**Adjusting the Budget to fit the income.** The intent is that the library expenses will be flexible enough that in the initial stages until there is steady revenue flow; savings can be made if necessary

by opening for fewer days, additional fundraising efforts, and appeals to larger donors.

**Initial Start-up Costs.** Start-up costs have been principally covered by a \$6000 Town Community Services grant and over \$7000 from Friends of the Library savings. Expenditures cover items such as insurance, collection software, collection processing supplies, barcode scanners, printer, items needed for computers, post office box, computer tech assistance, website purchase and name, and program offerings. The Friends also sent 6 transition team members to the California Library Association conference in Sacramento for valuable information and contacts. Countless volunteer hours have provided the work to ready the library for public use.

The Town treasurer has also been paying certain expenses on behalf of the library, such as utilities, grounds maintenance, janitorial, and trash pick-up. These expenses are expected to be repaid from future income.

## **Summary**

This plan lays out the scope, mission and goals of the Loomis Library and Community Learning Center, as well as outlining its governance and finances. While providing valuable service to the residents in the Loomis Basin, preserving a Town legacy since 1910, enhancing the Town's attraction as a historical destination that is family-friendly and promoting a walkable downtown district where people can live, shop, learn and play, the Loomis Library Community Learning Center is an incredible asset to the community residents, the local businesses and Town operations.

On behalf of the many volunteers who have made this possible, our thanks.

Ramona Brockman

Jenny Knisely

Bonnie London

Linda Sandahl

Jean Wilson

With significant help from Carol Mason and other transition team members

And appreciation for the Loomis Chamber of Commerce staff and volunteers

## **Appendices**

### **Appendix A. Estimated Loomis Library Operating Budget**

### **Appendix B. History of the Library and building**

The Town of Loomis has had a library for over one hundred years. In 1910, a lending library was established and as the town grew, so did demand for books and services. The Loomis library became part of the County library system in 1937. The library location moved several times and the Friends of Loomis Library approached the Gates family in 1976 seeking support to build a permanent Loomis Library. The father, Earl Gates, was a principal at Loomis Grammar school. His son, Francis Gates, and daughter, Marcia Gates Woods, became law librarians. The Gates family generously donated property for the Veteran's Memorial Hall and at the request of the County and Friends of Loomis Library, sold additional property to the County for a modest amount so the Loomis Library could be built in 1980. It was a community effort with people and organizations coming together to put in the landscape and provide interior furnishings, books, and funds. In 2006, the Town of Loomis and Friends of Loomis Library contributed almost \$150,000 towards the library expansion, bringing the building to 4488 square feet. The Friends of Loomis Library has provided ongoing financial support toward the building maintenance, equipment and collection development, in addition to sponsoring educational programs for the community.

## **Appendix C. Programs and Activities**

A municipal library not only has the opportunity to preserve the favorite activities for which the library is known, but also respond to the current needs of the community. Some events have been co-sponsored with the Loomis Chamber of Commerce. More such partnerships, such as with the Historical society and school districts, will benefit the library and community

Current or continuing activities have included:

- Quarterly book sales

- Summer reading program including craft day and two other events

- Summer speaker series, including Women of Mystery authors

- Lego Robotics (programming Legos) for different age levels

- Family Scarecrow Contest

- Christmas Craft Faire and Lasagna Lunch

- Book Club

- New Friends website and Social Media (Facebook, Twitter, etc.)

- Introduction of the new Owl mascot ("Loomie")

- October Health and Wellness series

- NASA Ambassador Series (Mars, rocket making)

- October Local History series

- Lend a Heart (Read to a Dog) program for shy readers, PTSD sufferers and others

Other activities that occur at the library or community room, such as:

- Literacy tutoring

- Tax assistance

- Current Events Discussion group (30-50 members weekly)

- Government and organizational meetings (e.g Horseshoe Bar-Penryn MAC)

- Girl Scout troops meetings

- Girl Scout Council adult trainings

- Private and family celebrations (birthday parties, small wedding receptions, etc.)

Other programs under development or consideration

- Genealogy workshop or club

- After school tutoring by William Jessup education students

- Youth council to advise and help plan on activities of interest to teens

- Gametime

- Lego club (donated Legos)

- New speaker series, including local authors and children's speaker

- Movie Nights

- Larger booksale area in the library (Mini-Bookstore)

- Health and Wellness series

- Various groups or classes: crafts, cards, knitting, photography, art

- Volunteer skills workshops or classes (how-to activities)

- More STEAM (science and art) for kids

- Create display space for local artists

- Provide display space for Loomis Historical Society and archives

- Wall space for Fruit Labels for addition to Town Branding project



Appendix "A"

Estimated Loomis Library Operating Budget

Operating Income		
Transaction Tax Revenue	\$200,000.00	
Community Room Fees	\$600.00	
Donations		
Operating Income Total		\$200,600.00
Operating Expenditures		
Personnel	\$60,000.00	Library Director
Personnel	\$25,000.00	Additional Library Personnel
Payroll Liabilities	\$7,000.00	
Professional Development	\$1,500.00	
Telephone/Internet	\$1,539.00	
General Liability & Directors Insurance & Workcomp	\$4,700.00	
It Services/Computer updates	\$1,400.00	
Operating Supplies	\$3,000.00	Office supplies, janitorial and cleaning supplies, misc. supplies,
Postage	\$300.00	
Professional Services	\$4,140.00	Bookkeeping \$1560, Catalog \$1800, Alarm \$420, \$360 Taxes
Printer Contract	\$2,400.00	
Data Base Subscriptions	\$4,700.00	
Dues & Subscriptions	\$800.00	North Net, CPLA
Programs	\$2,200.00	
Library Materials	\$10,000.00	\$5000 Books, periodicals, newspapers, videos,
Marketing Materials	\$1,200.00	
Utilities	\$14,400.00	PG&E, PCWA, SPMUD, Recology
Website/ Maintenance	\$1,200.00	
Building Maintenance	\$9,000.00	Janitorial, Pest, Restroom Supplies, Window Washing, Carpet,
Capital Replacement Plan	\$2,000.00	HVAC Maintenance
Facilities	\$1.00	Annual lease fee to County
Total Operating Expenditures	\$156,480.00	
Profit/Loss	\$44,120.00	
Reserves		
Net Profit/Loss	\$44,120.00	